

Add a New Site & Move Between Sites

Last Modified on 06/29/2026 3:08 pm PDT

Pathway: [Accounts](#) > [Search](#) > [Account Details Screen](#)

From the Customer screen, users can navigate between various site locations under the parent account, add new sites, and edit existing ones.

Streamline the Add Site process using site templates. Learn more here: [Create Site Templates](#).

The screenshot shows the 'SITE SEARCH' modal with the following data:

SITE ID	NAME	STATUS	OLD ID	ADDRESS	SITE CLASS	SALES REP	DIVISION
41898001	Navusoft - Demo	Active 119 Day(s)		5 Post Oak Blvd Houston, TX 77027 Harris County	COM	House Acct non System	HOUSTON
41898002	Navusoft - Demo...	Active 111 Day(s)		8100 Washingto... Houston, TX 770... Harris County		House Account	HOUSTON
41898003	Clone Test	Active 111 Day(s)		1234 Clone St Houston, TX 77057		House Acct non System	HOUSTON
41898004	Sara Tester	Active 1 Day(s)		7310 Santa Mon... West Hollywood... Los Angeles Cou...	COM	House Acct non System	HOUSTON

Permissions

The following permissions determine what a user can do beyond viewing a site when editing it:

Permission ID	Permission Name
5	View Account
6	View Site
8	Edit Site Status
67	Add Active Site
282	Edit Site Billing Settings
337	Edit Site Service Address
338	Edit Site Division and Service Region
339	Edit Site Source
340	Edit Site Sales Rep
451	Add or Edit - Override Account or Site Surcharge Rates

Field Descriptions - Add Site

Basic Settings

The Basic Settings tab includes vital site details like address, site name, notes, and other essential information for accounting and operational purposes.

Field	Description
Contact/Location Information (Name, Address, Phone)	Enter the contact and location information for the site.
Signature Required	If selected, the driver will be required to collect a signature each time they service the location.
LEED Reportable	If selected, data will be collected for environmental reporting.
Division	The division to which the site belongs. The division assigned to a site determines who manages the site in areas such as dispatch and operations and facilitates billing processes.
Service Region	Identifies the region the site belongs to.
Tax Region	Identifies the tax region the site belongs to.
Source	Indicates how the site originated and helps with future sales and marketing campaigns.
Sales Rep	The sales representative that manages the site.
Status	Indicates the current status of the site.
Site Class	The Site Class the site is included in.
Generator	The amount of waste expected to be generated by this site.
EPA	The EPA ID for the site.
State ID	The State ID for the site.
Additional Service Minutes	Expected additional service minutes needed to complete services for this site. This helps with route optimization, if being used.
Note	Displays in the site details section when viewing the Customer screen.
Warning on Open	Displays as a site-specific pop-up warning anytime the site is accessed.
Access Information	Used for conveying information the driver will need to access a location. Displays every time the location is serviced.
Business Hours / Service Window	Used to identify a site's hours of operation. Select the calendar icon to add a schedule.

Billing Settings

The Billing Settings tab establishes the billing requirements for the site, including the receipt method for invoices and the designated billing contact.

The screenshot shows a web form titled "ADD SITE" with three tabs: "Basic Settings", "Billing Settings", and "BIC Profile". The "Billing Settings" tab is active. The form contains the following fields:

- TAX EXEMPT?**: A checkbox that is currently unchecked.
- TAX EXEMPT REASON**: A text input field.
- SURCHARGE GROUP**: A dropdown menu with a clear button (X).
- INVOICE BY EMAIL**: A radio button with the label "Account Settings" selected.
- PAYEE NAME**: A text input field.

A green "SAVE" button is located at the bottom center of the form.

Field	Description
Tax Exempt	If the site <u>is</u> tax exempt and no tax region was selected when the site was created, select the Tax Exempt check box.
Tax Exempt Reason	If the Tax Exempt box is checked, enter supporting information for the reason why the site is exempt.
Surcharge Group	Select a Surcharge Group if the site is subject to a surcharge.
Invoice By Email	If the site is receiving invoices by email, select: <ul style="list-style-type: none"> • Account Settings and the site will follow the parent account's settings. • Email With Link and the site will receive a URL link to open the invoice. • Email With PDF Attachment and the invoice will be attached to the email as a PDF.
Payee Name	Select the name of the site's billing contact if the contact is different than the account contact. Contacts are only assigned here. To create a contact, the Contacts tool must be used.
Bill Group	Only displays if the 'Bill By Site' check box for the account is selected and settings in System Options are also enabled. See the Bill By Site section at the end of this article for additional details.

BIC Profile

The BIC Profile tab pertains to commercial establishments in New York mandated by law to arrange for the collection of their putrescible waste and recyclables through a hauler licensed by the Business Integrity Commission (BIC).

The screenshot shows a web form titled "ADD SITE" with a blue header. Below the header are three tabs: "Basic Settings", "Billing Settings", and "BIC Profile". The "BIC Profile" tab is active. The form contains the following fields:

- WASTE STREAM SURVEY:** A dropdown menu with "No" selected.
- BUSINESS TYPE:** A dropdown menu with "Not Selected" selected.
- CONTRACT TYPE:** An empty dropdown menu.
- OTHER FINANCIAL REQUIREMENTS:** An empty dropdown menu.
- COMMENTS:** A large empty text area.

A green "SAVE" button is located at the bottom center of the form.

Field	Description
Waste Stream Survey	Indicates if a waste stream survey was completed for the site.
Business Type	Specifies the business categorization used to identify the type of waste generated by the site.
Contract Type	Indicates if the contract between the customer and hauler was written or oral.
Other Financial Requirements	Indicates if the site has other financial requirements.
Comments	Option to provide addition comments regarding the site's BIC profile.

View All Sites

1. Select **# of #** (example: 1 of 2) to display the Site Search popup window.
 - o **TIP:** Use the filtering options at the top of the Site Search screen to narrow down the types of sites displayed. For example, if an account has many sites, you can filter to show only those with an "Active" status.
2. Double-click within the row of the desired site. The site will open in current window's tab.

Add a New Site

1. Select **# of #** (example: 1 of 2) from the Customer's screen to display the Site Search popup window.
2. Select the green '+' icon from the upper right corner in Site Search and select *Site*. A new 'Add Site' popup window will display.
3. Complete all required fields highlighted red in the *Basic Settings* tab and click **Save**. Additional fields should be completed based on your company's data entry procedures.

4. Select the *Billing Settings* tab and minimally complete all fields highlighted red and click **Save**. Additional fields should be completed based on your company's data entry procedures.

Bill By Site

In Billing Settings, a site can be configured to bill independently from its account when the site is added or edited. This option requires additional setup; without it, the Bill Group setting will not be available in the site's Billing Settings tab.

The screenshot shows the 'EDIT SITE' form with the 'Billing Settings' tab selected. The 'BILL GROUP' dropdown menu is highlighted in yellow. Other fields include 'TAX EXEMPT?' (checkbox), 'TAX EXEMPT REASON' (text input), 'SURCHARGE GROUP' (dropdown menu with 'Fuel Surcharge - Commercial' selected), 'INVOICE BY EMAIL' (dropdown menu with 'Account Settings' selected), 'SITE BILLING CONTACT1' (dropdown menu), 'SITE BILLING CONTACT2' (dropdown menu), and 'PAYEE NAME' (text input). A 'SAVE' button is located at the bottom center.

System Options Setup

Pathway: *Setup > System Options > Account [tab]*

At the system level, settings apply universally. In *System Options*, the **Enable Site Bill Group** setting must be set to Yes. If it is not enabled, the **Bill Group** dropdown will not appear in a site's *Billing Settings* tab.

The screenshot shows the 'SYSTEM OPTIONS SETUP' form with the 'Account' tab selected. The 'ENABLE SITE BILL GROUP' dropdown menu is highlighted in yellow and set to 'Yes'. Other settings include 'THRESHOLD DISCOUNT LAB TEST ID', 'API GRAVITY LAB TEST ID', 'SPECIFIC GRAVITY LAB TEST ID', 'ENABLE SITE BILLING ADDRESS' (No), 'ENABLE AGING BY SITE' (No), 'SERVICES GRID DEFAULT VIEW' (Standard), 'DEFAULT GENERATOR TYPE' (Small Quantity Generator), 'CREDIT HOLD REASON CODE' (Credit Hold), 'VACATION HOLD REASON CODE' (Vacation Hold), 'CREDIT HOLD NOTIFICATION TEMPLATE' (Acct Not), 'ENABLE ONLINE SIGNATURE MESSAGING' (No), 'LIMIT PAYMENT BATCH TO SINGLE DIVISION' (No), 'LIMIT BILL GROUP TO SINGLE DIVISION' (No), 'DISABLE AUTO PAY DAY OF MONTH' (No), 'ACCOUNT AND SITE DIVISION MUST MATCH' (No), 'SMS DEFAULT TASK TYPE' (Custom), and 'SMS UNKNOWN USER RESPONSE'.

Account Setup

Pathway: *Customer Service Screen (Accounts)*

At the account level, the **Bill By Site** setting must be enabled in the **Settings** tab. If this option is not enabled, the **Bill Group** drop-down will not appear in the site's **Billing Settings** tab.

EDIT ACCOUNT

Account Settings

Billing

BILL GROUP	QA_Doc_4 Week Anniversary	BILL BY SITE <input checked="" type="checkbox"/>	AUTO STATUS UPDATE <input checked="" type="checkbox"/>
INVOICE BY EMAIL	No	APPLY FINANCE CHARGES <input checked="" type="checkbox"/>	
TERM	COD	EXCLUDE FROM PAYMENT PROCESSING FEE <input type="checkbox"/>	
CREDIT LIMIT	500	EXCLUDE FROM PAST DUE NOTIFICATION <input type="checkbox"/>	
		HIDE WORK ORDER FORMAT RATE <input type="checkbox"/>	
		INBOUND ORDER AUTO PRINT <input type="checkbox"/>	

AP

DEFAULT PAYMENT METHOD	ACH	PAYEE NAME	1099 <input type="checkbox"/>
INSTRUCTIONS	Always access using East gate.		
WARNING ON OPEN	Verify payment status before scheduling additional service.		

SAVE

Related Articles

- [Add a New Account \(Prospect\)](#)
- [Create Site Templates](#)